

## CISI Financial Planning Courses and Support

As a CISI Premier Training Partner and qualifications specialist, we offer our delegates the best opportunities for first time success. We consistently achieve higher than national average success rates with expert, dedicated tutors committed to providing first class support.

We specialise in advanced level qualifications. Our CISI Premier Training Partner status is mainly due to training higher level qualifications.

Our wealth of experience in financial planning makes us ideal partners to help you work towards your Certified Financial Planner award.

### Tutor and Course Manager

*Cris Glasgow, Chartered FCSI, FPFS, Chartered Financial Planner*

Cris has been supporting people to achieve qualification success with CII, CISI and LIBF qualifications over the last 18 years. He has extensive experience in wealth management. As well as his industry experience, Cris has provided many CPD sessions about wealth management for the CISI.

Cris has passed the CISI Financial Planning and Advice exam, CISI Private Client Advice and Management and the level 7 Chartered Wealth Manager qualification. He took the pilot CISI Level 6 Certificate in Advanced Financial Planning and was awarded a distinction.

Having been an examiner, question writer, tutor and author for the CII, CISI and LIBF, Cris has the knowledge and experience to coach people to achieve first time success.



## CISI Level 4 Retail Advice and Planning

This is one of the non-compulsory units forming part of the CISI's Level 4 Investment Advice Diploma. It is a 2-hour paper comprising 80 multiple choice questions with a pass mark of 70%. It covers the important areas of protection, retirement planning and the financial advice process.

### Choose how you wish to study:

Support option	What is included?	Locations	Price
Revision course for the exam	1 x 2 day tutor led workshop to help candidates prepare for the narrative exam. The course revises main syllabus topics and provides lots of practice answering exam questions. 24/7 access to tutor support from the course start date up to the exam.	London. 17-18 March 2020	£450 per delegate
Email support only	24/7 email access to a tutor	N/A	£50 per month
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£90 per hour

## CISI Level 6 Certificate in Advanced Financial Planning

This is a single three-hour narrative paper at Level 6. The pass mark is a minimum of 50% but is variable. It covers the following areas:

- The financial planning process
- Existing provisions for realising objectives
- Retirement and estate planning
- Risk management
- Financial and budgetary management
- Creating a financial plan

### Choose how you wish to study:

Support option	What is included?	Locations	Price
Revision course for the exam	1x2 day tutor led workshop covering the main syllabus areas and providing lots of practise answering exam style questions enabling you to fine tune your exam technique. 24/7 access to tutor support from the course up to the exam date.	London. 21-22 July 2020	£500 per delegate
Email support only	24/7 email access to a tutor	N/A	£50 per month
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£90 per hour

## CISI Level 7 Diploma in Advanced Financial Planning

This is an assessment at Level 7. To pass, the candidate must satisfactorily complete a financial planning report and recommendations relative to a specific client case study provided by the CISI. The report will be assessed independently and will either be assessed as a pass or fail. If the latter, the candidate will have two further attempts to complete the report to a pass standard, after which a new case study will need to be attempted.

### Choose how you wish to study:

Support option	What is included?	Locations	Price
Revision course for the exam	1 x 2 day tutor led workshop to help candidates prepare for completion of the report. The course works through good practice and the expectations of the assessors and includes a process to follow in order to successfully complete the report. 24/7 access to tutor support from the course start date up to the submission.	London. 1-2 June 2020	£700 per delegate
Email support only	24/7 email access to a tutor	N/A	£50 per month
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£90 per hour

VAT, CISI fees, exam entrance and course book are not included. Courses are subject to a minimum of five delegates. Courses can be delivered in-company. Please contact us to arrange.

*'Having recruited two trainee advisers for the company I wanted to be sure they were given the best possible training for their level 4 qualification. The decision was taken to find the budget to bring in someone who could help them get through this first time. I had concerns that a centrally organised workshop may not be the answer from previous experience as larger groups are not always effective for every individuals learning style it also meant I could not dovetail the training with their work commitments. I needed something bespoke and I needed the right trainer with the right attitude.*

*I ascertained that Cris Glasgow came with the approval of a leading financial services institute so that satisfied my due diligence. I made contact with him and found him to have a flexible attitude and a professional approach. We agreed that he deliver bespoke training events for my trainees as part of their exam preparations.*

*I never had any doubt in the fact they would pass all elements required first time with the expert help of Cris. They are now level 4 qualified with an embedded knowledge of financial services which they could not have gained from just reading the workbook.*

*I was sufficiently impressed with Cris that I subsequently asked him to train myself and a newly hired Senior Adviser colleague in the new CISI Pension Transfer & Planning Advice exam. This presented a fresh challenge as it was a new exam and he had to teach us in a subject neither of us had experience in ( DB Pension Transfers) With his help we both passed this exam at the first time of asking which just goes to show " you can teach old dogs new tricks!*

*Cris Glasgow is an excellent financial services trainer. He has had a 100% success rate with our team and I cannot recommend him highly enough.'*

*Kevin Bray, FPFS, Financial Planning Director*



**For course dates and to book, go to [www.glasgow.co.uk/courses](http://www.glasgow.co.uk/courses)  
To discuss your requirements, call us on 0203 292 9229 or  
email us at: [info@glasgow.co.uk](mailto:info@glasgow.co.uk)**